

COUNTY OF SAN BERNARDINO
REQUEST FOR PROPOSALS (RFP) FOR
EMPLOYEE BENEFITS HEALTH AND WELFARE CONSULTING AND ACTUARIAL
SERVICES

	<u>Project Due Date</u>	<u>Frequency</u>
A. Coordination of and participation in insurance/TPA meetings	As needed	Quarterly
B. Coordination and participation in Employee Benefits Advisory Committee (EBAC) meetings	3 rd Wednesday of the month and as needed	Monthly
C. Insured Health Plans		
1. Annual benefit change review and rate renewals	March 2006	Annually
2. Coordination of RFP and implementation of results	March 2007	Every 2 years
3. Facilitate contract renewals	May 2006	Annually
4. Participant satisfaction survey	February 2006	Annually
D. Insured Dental Plan		
1. Annual benefit change review and rate renewals	March 2007	Annually
2. Coordination of RFP and implementation of results	March 2006	Every 3 years
3. Facilitate contract renewals	May 2006	Annually
4. Participant satisfaction survey	February 2006	Annually
E. Self-Funded Dental Plan		
1. Claims analysis report	Within 30 days of the end of each quarter	Quarterly
2. Coordination of and attendance at quarterly TPA meeting.	Meeting held quarterly	Quarterly
3. Annual benefit change review and rate renewals	March 2007	Annually
4. Coordination of RFP and implementation of results	March 2006	Every 3 years
5. ASO Agreement	2006	Every 3 years
6. Develop Plan Document	March 2006	Annually
7. Develop Summary Plan Description	March 2006	Annually

8. Actuarial rate renewals

January 2006

Annually

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	<u>Project Due Date</u>	<u>Frequency</u>
9. Actuarial rate impact of benefit enhancements/reductions	January 2006	Annually
10. Participant satisfaction survey	February 2006	Annually
F. Vision Plans		
1. Claims analysis report	Within 30 days of the end of each quarter	Quarterly
2. Coordination of RFP and implementation of results	2008	Every 3 years
3. Develop Plan Document	March 2006	Annually
4. Develop Summary Plan Description	March 2006	Annually
5. Actuarial rate renewals	January 2006	Annually
6. Actuarial rate impact of benefit enhancements/reductions	January 2006	Annually
7. Participant satisfaction survey	February 2006	Annually
G. Self-Funded Short-Term Disability Plan		
1. Claims analysis report	Within 30 days of the end of each quarter	Quarterly
2. Annual benefit change review and rate renewals	2006	Annually
3. Review and/or revise Plan Document	June 2006	Every 2 years minimum
4. Review and/or revise Summary Plan Description	July 2006	Every 2 years minimum
5. Actuarial rate renewals/review	January 2006	Annually
6. Actuarial rate impact of benefit enhancements/reductions	January 2006	Annually
7. Participant satisfaction survey	August 2005	Annually
H. Life Insurance Policies		
1. Coordination of RFP and implementation of results	August 2007	Every 5 years
I. Section 125 Plans		
1. Premium Conversion Plan Document review	April 2005	Annually
2. Premium Conversion Summary Plan Description review	April 2005	Annually

3.	Dependent Care Assistance Plan (DCAP) Plan Document review	October 2005	Annually
		<u>Project Due Date</u>	<u>Frequency</u>
4.	Dependent Care Assistance Plan (DCAP) Summary Plan Description review	October 2005	Annually
5.	Medical Reimbursement (FSA) Plan Document review	April 2005	Annually
6.	Medical Reimbursement (FSA) Summary Plan Description review	April 2005	Annually
J.	Data Management Projects		
1.	Development and review of medical and dental data management report system recommendations to help monitor and identify problems/issues.	2005	Annually
2.	Development of medical and dental data procedures which need to be obtained or changed for the management report	2005	Annually
K.	Program Compliance		
1.	Review compliance and recommend specific changes to comply with HIPAA and DOL electronic data information	January 2006	Annually
2.	Review compliance and recommend specific changes to HIPAA and DOL SPD regulations	January 2006	Annually
3.	Establish guidelines and conduct HIPAA audit	July 2005	Every 3 years
4.	Establish guidelines and conduct COBRA audit	July 2005	Every 3 years
L.	Training		
1.	Conduct on-site Section 125 training	September 2005	Every 2 years
2.	Conduct on-site COBRA training	May 2006	Every 2 years
3.	Conduct on-site training as necessary	November 2005	Annually
M.	Multiple Welfare Association Assessment		
1.	Research and assess each agency for which the County provides benefits	February 2006	Annually

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	2. Recommend modifications to contracts, Plan Documents and other benefit related communication materials to insure County compliance	March 2006	Annually
		<u>Project Due Date</u>	<u>Frequency</u>
	3. Determine appropriate IRS filings	March 2006	Annually
N.	EHaP (Employee Health and Productivity) Program		
	1. Participation in Employee Assistance Program (EAP) meetings	As scheduled	Quarterly
	2. EAP RFP	January 2005	Every 3 years
	3. Participation in EHaP quality assurance meetings with health plans vendors	As scheduled	Quarterly
	4. Participation in County-specific performance standards and data reporting meetings with health plan vendors	As scheduled	Quarterly
	5. Integrated Disability RFP	To be Determined	Every 3 years
O.	Staff Support		
	New and ongoing project status inquiries	Within 24 hours	Daily

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